

REQUISITIONING TIPS

[What does Procurement Services look for when reviewing a requisition?](#)

[Procurement Policy](#)

[Use of Direct Payments](#) (previously known as NPO's)

[Contracts and Procurement Planning](#)

[Procurement Calendar](#)

[Mercury Commerce](#)

[State of Connecticut](#)

[Procurement Thresholds](#)

[Unauthorized Purchases](#)

[Sole Source Requests](#)

[Emergency Procurements](#)

[MUNIS fields to use to define your purchases](#)

[Attach Documents](#)

[Item Descriptions](#)

[Internal communications](#)

Requisitioning FAQs

[When to requisition a purchase order?](#)

[Where are Procurement's Policies and Procedures?](#)

[How do I Login to Mercury Commerce?](#)

[Where do I find Contracts?](#)

[What are some key requisitioning points to remember?](#)

[Where do I put External communications?](#)

[Where do I put Internal communications?](#)

[Why has this requisition been returned \(rejected\) to me?](#)

[How do I indicate a requisition is for a Blanket Order?](#)

[How do I initiate a Change Order?](#)

What does Procurement Services look for when reviewing a requisition? [Top](#)

- Appropriate procurement process has been followed
- Competitive solicitations are referenced
- Contracts are referenced and attached
- Supporting documentation / emails are attached in the internal notes section.
- Item titles are appropriately descriptive
- Descriptions have enough detail so that anyone looking at the PO will know what is going on and where to find the details if they are not included in the description. The description should also give some time frame for the service or delivery.
- Correct Commodity Code is selected

Be sure to include and reference appropriate documentation, quotes and / or contracts with your requisitions. Due to the significant volume Procurement Services receives we will reject requisitions that do not:

- Accurately describe the item or service being purchased;
- Have attached or reference necessary documentation.

Please do not assume that we "know" about a contract or order. Include this information on your requisition. Contact us before issuing a requisition you are having difficulty finding contract information to reference.

In MUNIS use:

General Notes for **internal communications** and attachments such as Sole Source documentation, 2nd and 3rd price quotes (things the vendor shouldn't see).

Vendor / Sourcing Notes for **external communications** such as bid and/or contract reference, vendor's price quote (things the vendor should see).

Use of Direct Payments (previously known as NPO's):

[Top](#)

The use of a direct payment is limited to small **one-time** purchases of commodities of less than \$5,000 where a P-Card is not available.

Direct Payments may also be used for the following items if they are less than \$10,000 in value:

- Utilities
- Temporary Personnel costs
- Expense Reimbursement
- Fees paid to another governmental entity (such as license or inspection fees)

Direct Payments may also be used for the following items regardless of value:

- Legal Services paid out of the Corporation Counsel's Office

Procurement Policy:

[Top](#)

Procurement policy in this guide is based on City Charter Chapter VIII Sec 5(D) and Ordinance Chapter 2, Article XII, Divisions 1 through 11. City and Public School employees and officials who spend or authorize the expenditure of public funds are responsible for knowing and abiding by these policies. The information in this document hits on some of the key points of the statutes but is not all inclusive.

Policy, how to guides and forms are available on-line at:
<http://www.hartford.gov/purchasing/Policy.htm>. Currently posted are:

All of the forms and manuals associated with the P-Card program

Sole Source documentation form & policy

Emergency documentation form & policy

Surplus equipment inventory & sign over form

Contracts and Procurement Planning:

[Top](#)

Procurement Calendar. <http://hm-2k3-appweb01/procal/>

The Procurement Calendar manages City and School contracts and establishes a schedule for all currently known procurement activity (some as much as 10 years out). It also identifies purchases that can be targeted to the small and minority business community. The “start dates” are the dates when Procurement will begin to work on a project. Departments in need of an item scheduled on the Calendar should submit their requirements by the Start Date. These dates anticipate the lead-time required to procure the items or services and execute a contract.

Procurement Calendar Home Page

Main Calendar Menu - Windows Internet Explorer

http://hm-2k3-appweb01/procal/

File Edit View Favorites Tools Help

Links RFP Depot Google Dictionary.com Procurement Calendar - Online Login to pop3b.netsynergy.com Peoples DAS - Bid Postings DAS - Procurement

Main Calendar Menu

Procurement Calendar

Data Entry	Calendar Export to Excel
Reporting	Contracts To End Search Procurement Calendar Search Calendar By Departments
Supporting Tables	Commodities Departments Buyers Contract Entities
Active/Inactive Data	Commodity Data Department Data Buyer Data Contract Data Calendar Data

Click on the word "Calendar" to open and search for contracts and procurement events

Calendar Page - Windows Internet Explorer

http://hm-2k3-appweb01/procal/CalendarForm.aspx

File Edit View Favorites Tools Help

Links RFP Depot Google Dictionary.com Procurement Calendar - Online Login to pop3b.netsynergy.com Peoples DAS - Bid Postings DAS - Procurement

Calendar Page

1. Select a column and drag and drop it to another section to move the columns.
2. Drag a column and move to top area to filter further. More than one column may be moved. To revert back simply drag the column heading back.
3. Click row to view more data elements and their values.
4. Enter text in textbox then click "Find>>" button to view only those Commodities that begin with the text you enter.
5. Click "Reset" to view all Commodity Data.
6. Status selection, P = Preparation, B = Out for Bid, E = Responses being evaluated, C = Contract being prepared, F = Finished, H = On hold, S = Scheduled

Procurement Calendar

Find>> Reset Add New Help Home

Current Row: 81 - Current Column: 1

a column header here to group by that column
on column header to sort by that column

Commodity	Buyer	Current Start Date	Contractor	Contract End Date	Status
Construction Equipment	JW	04/01/2008			
Copy Machine - New	U	09/01/2007	Ikon Office Solutions	07/01/2009	
Copy Machine -Leasing	U	09/01/2007	Ikon Office Solutions	11/06/2009	
Crack Sealing Material	JW	04/12/2009	Crafco, Inc.	06/30/2009	
Crushed Stone	JW	01/10/2008	Tilcon Connecticut, Inc.	03/31/2010	
Demolition & Asbestos & Abatement	CR	01/15/2008	currently out to bid bid	05/30/2008	
Demolition of 2 Properties	BB	09/18/2007	Proposals due 10/18/0		
Design for Bluehills Recreation Center	CR	04/03/2008		12/12/2008	
Detention and Care of Impounded Stray Dogs	BB	04/04/2008	Connecticut K-9, Inc.	04/30/2009	C
Diesel Engines, Parts And Repairs (Nbr)	JW	11/01/2007			
Diesel Fuel, Fuel Oil	MT	04/01/2008	East River Energy	06/30/2009	F
Drain Cleaning Services	CR	10/09/2007		09/01/2007	
Drug Testing Services	BB	02/17/2008			
Dry Lime And Field Marking Paint	U	03/05/2008			
Electrical Services	CR	01/12/2008	Custom Electric, Inc.	03/31/2008	
Electric Motors, Repair of	CR	10/03/2007	Reliable Elec. Motors		
Electrical Supplies - MRO (A)	CR	05/15/2008	Northeast Electrical Dis	07/31/2008	
Electrical Supplies - MRO (B)	CR	04/25/2009	Graybar	06/30/2010	
Electricity - Generation of	MT	10/20/2009	Constellation New Ene	01/01/2010	

Enter key word to find

Click to access event information

Calendar Page - Windows Internet Explorer

http://hm-2k3-appweb01/procal/CalendarForm.aspx

File Edit View Favorites Tools Help

Links RFP Depot Google Dictionary.com Procurement Calendar - Online Login to pop3b.netsynergy.com Peoples DAS - Bid Postings DAS - Procurement

Calendar Page Home Feeds (J) Print Page Tools

Commodity or Service Diesel Fuel, Fuel Oil

Status F

Original Start Date 4/1/2008

Original Start Date Comments

Reason for Revised Date and Comments

Class Item Codes 405-09 Fuel oil, Diesel (Use 405-02 for Biodiesel)

Buyer MT

Current Contract or Lease Number 507 Other Reference Number

Contract or Lease # Site Address <http://hs-win-sppro01.29092/SiteDirectory/Finance/Procurement%20Calenda>

Contract Name East River Energy Contract Value (Annual) \$600,000.00

Contract Site Address 401 Soundview Road, Guilford, Connecticut 06437-0388

Contract End Date 6/30/2009

Contract History

Contract Entity CROCOG

Departments Department of Public works, Hartford Fire Department

Small Business Enterprise Target ☐ Minority Business Enterprise Target ☐

Living Wage ☐

Comments

Add New Edit Delete Help Home

Click here to access contract

Contracts on Mercury Commerce

[Top](#)

Contracts for commonly requisitioned items will be set up on Mercury Commerce. Requisitions can be generated directly from these contracts.

Contracts on the State Web Site

[Top](#)

You can view at <http://www.hartford.gov/purchasing/Policy.htm>. A link to the State contract search screen is provided at the bottom of the page.

Procurement Thresholds:

[Top](#)

Up to \$5000.00

Open competition not required. Departments may purchase items using a Procurement Card or a Direct Payment (NPO). Procurement Cards and purchase orders at this level are used for small one-time purchases using contracted suppliers when available.

\$5000 to \$25,000

Open competition is required through a request for quotes or reverse auction. Generally awards are issued to the lowest responsible supplier that meets requirements.

\$25,000 and over

Open competition is required through a formal bid process. Generally awards are issued to the lowest responsible supplier that meets requirements.

Unauthorized Purchases:

[Top](#)

Purchases made without a purchase order, P-card or within the Direct Payment policy are unauthorized. Funds must be encumbered in the City's financial system prior to the ordering and delivery of any goods or services. City Ordinance Section 2-539 established the policy that ***any Public Official or Employee who makes an unauthorized purchase is subject to removal from office or termination of employment.***

Vendors will receive notices that they must receive a valid purchase order or Procurement Card before delivering services or performing work for the City. If they continue to perform without Procurement authorization payment will be at risk.

Sole Source Requests:

[Top](#)

As a part of Procurement Service's due diligence we will issue a request for information (RFI) to determine if an item is truly sole source. This generally takes one week. If it is found that there are other providers for the product or service a formal solicitation may be required. Department staff will need to build this lead-time into their sole source request.

Emergency Procurements:

[Top](#)

Refer to the Emergency Procurement Guidelines and the Emergency Purchase Documentation Form available at: <http://www.hartford.gov/purchasing/Policy.htm> for specific information on procedures.

MUNIS fields to use to define your purchases

[Top](#)

Header Level Screen

Attachments:

Referenced contracts, quotes, emergency or sole source forms or other documentation are attached at the header level using the paper clip icon in the tool bar. A MUNIS help document for this was distributed with my July 10, 2008 email.

The screenshot displays the 'Requisition File Maintenance - MUNIS (CITY OF HARTFORD)' window. The interface includes a menu bar (My, File, Edit, Tools, Help) and a toolbar with various icons. The main area is divided into several sections:

- Line Detail:** A vertical sidebar on the left with buttons: Release, Approvers, Activate, Allocate, Notes, Copy, GL Allocations, GL Summary, and Training Course.
- Main Section:**
 - Dept/Loc:** 21100 FIRE REQ
 - Status:** 6 Released
 - Fiscal year:** 2009 (Current/Next)
 - Requisition number:** 10828
 - General commodity:** 675
 - General description:** PESTICIDES AND CHEMICALS: AGRI
 - General Notes:** A button with a paper clip icon.
 - Vendor:** 22782 Guardian Pest Control Llc (Committed checkbox is checked).
 - Name:** Guardian Pest Control Llc
 - PO mailing:** 0
 - Address:** 15 North Washington St, PLAINVILLE, CT 06062
 - Remit:** 1 Guardian Pest Control
 - Vendor/Sourcing Notes:** A button with a paper clip icon.
 - Ship to:** FOPERL, Fire Dept- Pearl Street, 275 Pearl Street, Hartford, CT 06103
 - Reference:** Cpat. Chance
- Table:** A table with columns: Line, Qty, Unit Price, Freight, Disc %, Credit, Line Total, and Description. It contains one row: Line 1, Qty 1.0, Unit Price 4463.00000, Freight 0.00, Disc % 0.00, Credit 0.00, Line Total 4463.00, Description 4463.00 Pesticides: p.
- Total Amount:** 4463.00
- Page Info:** 1 of 1

The “**General Description**” will either have the Mercury Commerce req number in it or the default commodity code description. Delete these descriptions and type in a two or three word, high level description of what is being purchased.

"Internal" communications such as notes to Procurement describing why a purchase was done in a particular way or other communications that the vendor should not see go into MUNIS's **General Notes**.

Vendor sourcing notes are for Procurement use. We will generally place standard text here such as “Blanket Order, releases as directed by the department

Line Item Level Screen

[Top](#)

Item Descriptions:

Generally the description inserted in the window after you pick the 5-digit commodity code is not adequate and needs to be deleted.

The information you place in the "Description" is for the vendor or Provider of the service. It needs to clearly define the work that is being done or the items being delivered (so that anyone such as an auditor can understand it) and specifically reference any contracts or quotes.

If accurately describing the service or item(s) requires more than approximately 100 words and the service or item(s) are completely described in a written quote, you may briefly describe the purchase and reference (and attach) the quote. For example, this description might be written: "Provide pest control services for the listed fire stations as described on the attached quote number 8745 dated 05/26/2008."

Line Detail

My File Edit Tools Help

Copy

Requisition
Fiscal year 2009 Number 10828 Line 1

Detail
Quantity 1.0 Unit price 4463.00000
Commodity 6754 UOM EACH
Inventory Item Location Type
Pick basket
Purchase
Description Pesticides - pest control for the various fire stations
Add'l Desc/Notes

Miscellaneous
Vendor 22782 Dept/Loc 21100 FIRE REQ Fixed asset N
1099 box Required by 06/15/2008
Bid Requested by
Amount justification: Not Needed

Seq	Org	Obj	Project	Description	Amount	Bud
01	211008	534098		OTHER, CH & PROF SER	4463.00 U	

1 of 1

8:59 AM

If you run out of room in the "Description" window you may also use "Add'l Desc/Notes"

Referenced contracts or quotes are attached at the header level (see screen shot on first page) using the paper clip icon in the tool bar.

REQUISITIONING FAQs

08/21/2008

[Top](#)

The following FAQ information is a compilation of messages that have been sent to Requisitioners since initial training on the MUNIS / Mercury Commerce requisitioning system.

[When to requisition a purchase order?](#)

[Where are Procurement's Policies and Procedures?](#)

[How do I Login to Mercury Commerce?](#)

[Where do I find Contracts?](#)

[What are some key requisitioning points to remember?](#)

[Where do I put External communications?](#)

[Where do I put Internal communications?](#)

[Why has this requisition been returned \(rejected\) to me?](#)

[How do I indicate a requisition is for a Blanket Order?](#)

[How do I initiate a Change Order?](#)

When to requisition a purchase order?

We have found many instances, in the past, where departments are creating requisitions in order to pay bills for goods and services already received. This is the reverse of how the procurement process is designed to work and only increases everyone's stress levels, is inefficient and frequently results in delay in vendor payments. You must obtain a purchase order prior to allowing the delivery of any items or services.

Where are Procurement's Policies and Procedures?

[Top](#)

Procedures, how to guides and forms are being made available on-line at:
<http://www.hartford.gov/purchasing/Policy.htm>. Currently posted are:

- All of the forms and manuals associated with the P-Card program
- Sole Source documentation form & policy
- Emergency documentation form & policy
- Surplus equipment inventory & sign over form

How do I Login to Mercury Commerce?

We suggest you place an icon for Mercury Commerce
<http://www.mercurycommerce.com/> on your desktop. Instructions on how to create links are attached.

Click on "User Login" not "Vendor Login;"

Tax ID is 061030000;

User name = everything to the left of the "@" in your email address. So if your email is remi001@hartford.gov your user name is "remi001;"

Password is set to the word "password." You will be asked to change your password to something unique that you can remember. If you forget your password in the future click on "Forgot Password?"

Authentication Code: On your first login you will be presented with a screen that requests an "Authentication Code." This code is the same as the Tax ID. 061030000.

Where do I find Contracts?

[Top](#)

You can view on the Procurement Calendar at <http://hm-2k3-appweb01/procal/>. Be sure to include and reference appropriate documentation, quotes and / or contracts with your requisitions. Again, we will reject requisitions that do not have or reference necessary documentation. Please don't assume that we "know" about a bid or contract that is associated with an order.

What are some key requisitioning points to remember?

PLEASE pay attention to accurately describing the item or service being provided, referencing the bid and/or contract and attaching appropriate documentation. We want to expedite your purchases not be a road block! Given the volume of requisitions we receive each year we will return anything that is not well described or have appropriate references and attachments.

Keep in mind that the information you place in the "Description" is for the Provider of the service. It needs to clearly define the work that is being done (so that anyone such as an auditor can understand it) and reference any attached contracts or quotes.

Here is an email from a vendor who received a PO from the City. It is an example of why clear, complete descriptions, with references are important:

-----Original Message-----

From: Lilia Silva

Sent: Monday, August 18, 2008 10:51 AM

Subject: RE: 00100798

I received the purchase order, what I am looking for is the quote that itemized the requested smartboard setups. There are various set-ups and the purchase order that was sent to me does not specify exactly what you would like.

Thank you

External communications such as item descriptions, contract or quote references, contact persons, or special shipping instructions are to be included in either the Line Detail "Description" or, if you run out of space, "Add'l Desc/Notes."

Internal communications such as notes to Procurement describing why a purchase was done in a particular way or attachments such as Council Resolutions go into MUNIS's General Notes.

Why has this requisition been returned (rejected)?

[Top](#)

We will return all requisitions that require any kind of fixing so that problems are dealt with upfront and don't continue on for future requisitions. The most common rejection comments are:

1. The line item description(s) need additional detail so that anyone looking at the resulting PO will know what is going on and where to find the details if they are not included in the description (example: "as per quote #XXX, dated dd/mm/yy" or "terms and conditions as per contract XXX, dated dd/mm/yy"). The description should also give some time frame for the service or delivery. Be sure to scan and attach the quote or executed (signed) contract. Please correct and re-issue the requisition.

Remember, the PO in most cases, is the City's form of agreement with the Supplier. Its' terms need to be detailed and include all "understandings."

2. Scan and attach the quote or executed (signed) contract.

3. The General Description of this requisition contains the default text from Mercury Commerce. Please replace with a two or three word description of what is being purchased. For example "Teacher Development Services" or "Office Supplies - Blanket Order."

4. The appropriate 5-digit commodity code for the line item(s) is missing.

How do I indicate a requisition is for a Blanket Order?

Indicate in the "General Description" if you intend to generate a blanket order. For example "Office Supplies - Blanket Order"

How do I initiate a Change Order?

[Top](#)

The Mercury Commerce / MUNIS system does not have a method for departments to create and approve change orders. Please keep this in mind when creating requisitions. Be sure that your blanket orders are large enough to cover your needs and that pricing received for goods is accurate and includes any charges such as shipping.

To manage this process, until change order creation/workflow functionality is developed for MUNIS, we ask that the following steps are followed:

1. All change order requests must be in the form of an email from a Department or Division Head. A Department or Division Head may delegate this responsibility. Send me this delegation, in writing, on department letterhead.

2. Change order request emails must contain the following information:

a. PO number - Place the following information in the in the email subject line:
" [PO#] - Change Order Request - [three or four word description of the reason for or type of change]"

for example

101168 - Change order request - add shipping costs

- b. The requested change(s) such as -
 - Amount to increase
 - Line item(s) to increase
 - Line item description change
 - Other
 - c. Reason for change request
 - d. Backup documents scanned and attached
3. Email the change order request to the buyer assigned below to handle your request

Buyer Department

Mark Turcotte	Emergency Services & Fire Metro Hartford Information Services Police
---------------	---

Carita Rozie	Housing & Community Development Mayor Parking Authority Public Works Management & Budget
--------------	--

Josephine Williams	Corporation Counsel Court of Common Council Development Services Finance Grants Management Health and Human Services Human Relations Library Personnel Procurement Services Registrar of Voters Tax Collector Town & City Clerk Treasurer Young Children Office for Youth Services
--------------------	---